

# WORKSHEET INSTRUCTIONS

The Foundation relies on Truman Scholars to calculate their scholarship payments on the **Truman Scholar Payment Request Form (PRF)**. To determine the amount the Foundation owes you, use the **Worksheet for Payment Request Form** (below) and follow these instructions for its completion. Do not submit this worksheet with your **PRF**.

You will need the information provided by the Financial Aid Office on the **Truman Scholar Educational Expenses and Support Form (EESF)** to calculate your payment request. You must submit the **EESF** with your first payment request of the academic year and with a request for support for summer study.

## Part A: Expenses

Lines A1-A5: Enter the amounts from the **EESF** for Tuition, Fees, Books, Room and Board on Lines A1-A4 and total in Line A4a. Enter Additional Expenses on Line A5.

Lines A6, A7, A9, A11: The figures from the **EESF** are for the entire school year. Divide the figures in Lines A1, A2, A4 and A5 by 2 if you will be on a semester system or by 3 if you are on a trimester or quarter system to make the entries on Lines A6, A7, A9 and A11.

Line A8: The Foundation's maximum payment per year for books is \$1000. Divide the figure from the **EESF** by 2 (semester) or 3 (trimester or quarter). Enter the lower of the maximum figure (\$500 or \$333) or the **EESF** figure (divided by 2 or 3).

Line A10: Add Costs from Lines A6-A9 and enter total.

### SUMMER SCHOOL:

If you are making a payment request for a summer term you must:

1. Obtain an **EESF** with part 8a and 9 completed for the summer term.
2. Leave Lines A1-A5 of the Worksheet blank.
3. Transfer the amounts from 8a of the **EESF** to Lines A6, A7, A8, A9 & A11.
4. Proceed with Worksheet according to directions.

## Part B: Financial Support and Aid for THIS TERM.

**Do not** include your own earnings or savings, repayable loans, support from your family or support from the Department of Veteran Affairs.

**Include** all scholarships, grants and tuition and fee waivers you will receive this term other than the Truman Scholarship. This covers: Fellowships, Pell Grants and all other need-based or merit-based assistance.

Enter amounts for this **THIS TERM only**.

**Undesignated Support:** Classify the support as **Undesignated** if the source of the support does not specify how the support is to be used. Pell Grants are an example of undesignated support.

**Designated Support:** Classify the support as Designated if the source specifies how it is to be used. For example: tuition; tuition and books; or tuition and room and board. Tuition and fee waivers are designated support.

Lines B1-5: List all sources and amounts of **undesignated** support. If you have more than five undesignated sources, list the additional ones with the amounts on a separate sheet.

Line B6: Add the amounts on Lines B1-5 plus any other **undesignated** support you have listed on a separate sheet and enter the total here.

Lines B7-11: List the sources and amounts of **designated** support. If you have more than five designated sources, list the additional ones with the amounts on a separate sheet.

Line B12: Add the amounts on Lines B7-B11 plus any other **designated** support you have listed on a separate sheet and enter the total here.

## Part C: Maximum Truman Scholarship Payments

Line C1: Check appropriate box and enter the amount on Line C2a.

Line C2a: Enter the amount from Line C1. Enter this amount on Line 13d of the **PRF**.

Line C2b: Enter the amount already received from the Truman Scholarship Foundation for any previous term(s) this academic year. If this is the fall term, the amount should be zero (-0-) unless you made a request for a summer term. Enter this amount on Line 13e of the **PRF**.

Line C2c: Subtract Line C2b from Line C2a. This is the maximum amount of payment available for this term. Enter this amount on Line D9.

## Part D: Payment Request Calculation

Line D1: Undesignated support: Enter the amount from Line B6

Line D2: Additional Expenses: Enter the amount from Line A11.

Line D3: Remaining Undesignated Support: Subtract Line D2 from D1. Enter the result on Line D3. If Line D2 is larger than D1, enter zero (-0-).

Line D4: Designated support: Enter the amount from Line B12.

Line D5: Add Lines D3 and D4 and enter the amount on Lines D5 and D7.

Line D6: Total Allowable Expenses: Enter the amount from Line A10.

Line D7: Enter the amount from Line D5.

Line D8: Subtract Line D7 from D6 and enter the amount here.

Line D9: Maximum Payment: Enter the amount determined in C2c.

Line D10: Payment request: Enter D8 of D9, whichever is smaller. Enter on Line 13f of PRF.

# WORKSHEET INSTRUCTIONS

## Part A: Expenses

Costs for <b>Academic Year</b> from <b>EESF</b>	Costs for <b>THIS TERM</b>
A1. Tuition	A6. Tuition Enter on Line 12a of <b>PRF</b>
A2. Fees	A7. Fees Enter on Line 12b of <b>PRF</b>
A3. Books	A8. Books Enter on Line 12c of <b>PRF</b>
A4. Room & Board	A9. Room & Board Enter on Line 12d of <b>PRF</b>
A4a. Total Allowable Expenses Total A1-A4	A10. Total Allowable Expenses Total A6-A9. Enter on Line D6, Line 12e and 13a of <b>PRF</b>
A5. Additional Expenses	A11. Additional Expenses Enter on Line D2 and Line 12f of <b>PRF</b>

## Part B: Financial Support and Aid for THIS TERM.

(If you will have no support other than the Truman Scholarship, enter 0 in Line B6 and Line B12)

### Undesignated Support

	Source	Amount
B1		
B2		
B3		
B4		
B5		
B6	Total: (Enter on Line D1)	

### Designated Support

	Source	Amount
B7		
B8		
B9		
B10		
B11		
B12	Total: (Enter on Line D4)	

## Part C: Maximum Truman Scholarship Payments

C1. Maximum Annual Payment. Enter amount on Line C2a.

Undergraduate Study: ? \$3,000

Graduate Study: ? One or two year graduate program: \$13, 500

? Three or more year graduate program: \$9,000

? Other \$ \_\_\_\_\_

C2. Maximum Payment for **THIS TERM**

a. Maximum Amount for Academic Year (from C1). Enter on Line 13d of **PRF**. \_\_\_\_\_.

b. Amount Received for previous term(s) of this academic year. Enter on Line 13e of **PRF**. \_\_\_\_\_.

c. Subtract Line C2b from Line C2a. This is the maximum available for **THIS TERM**. Enter on Line D9. \_\_\_\_\_.

## Part D: Payment Request Calculation

Line D1 Undesignated Support (Line B6) \_\_\_\_\_.

Line D2 Additional Expenses (Line A11) \_\_\_\_\_.

Line D3 Remaining Undesignated Support, Subtract Line D2 from D1. If Line D2 > D1, enter 0. \_\_\_\_\_.

Line D4 Designated Support (Line B12) \_\_\_\_\_.

Line D5 Total Deductible Support (add Lines D3 and D4)  
Enter in Line D7 and Line 13b of **PRF**. \_\_\_\_\_.

Line D6 Total Allowable Expenses (Line A10). Enter on Line 13a of **PRF**. \_\_\_\_\_.

Line D7 Total Deductible Support (Line D5) \_\_\_\_\_.

Line D8 Expenses Eligible for Payment (subtract Line D7 from Line D6). Enter on Line 13c of **PRF**. \_\_\_\_\_.

Line D9 Maximum Payment (Line C2c) \_\_\_\_\_.

Line D10 Payment Request: Enter the smaller of Line D8 or Line D9. Enter on Line 13f of **PRF**. \_\_\_\_\_.